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About Casey’s Furniture:

Having started trading in 1921 and remaining a family business ever since, Casey’s Furniture prides itself on its customer service and being a retailer of choice. When the business needed to upgrade from an older IT system, Mach4, in 2006 it saw the opportunity to consolidate the disparate systems that had been used until then. Doing this would help the company achieve one single version of information, enabling more streamlined operations, greater control of its operations across finance, logistics, sales order and purchase order processing, and further improving the quality of its customer service

Casey’s operations comprise two stores in Cork and Limerick, as well as a full nationwide delivery service using its own vehicle fleet. As a modern furniture retailer, the business needs are complex, as Finance Director Eamon Holmes explains. “Retailing and distribution of furniture requires specialist functionality and the management team at Casey’s set about looking for an ERP system that could handle adding bespoke elements to it, but would keep the core functionality intact. The new ERP system also needed to be user friendly with a clear progression path.”

Casey’s needed to address the five key issues in the business: “islands of information” located in various Excel, Word and other file types; a lack of consistent information between the different systems; disjointed business processes governed by more than one system; slow and unwieldy margin analysis. In addition, there was room to improve customer service, because important information about orders such as expected delivery times had to be extracted from different systems.

Holmes took his time evaluating various ERP systems. “Whatever software was to be chosen needed to include an element of bespoke development which would add the Casey’s ethos to it,” he says.

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The Solution:

By autumn 2006, after a thorough review process, Casey’s identified Microsoft Dynamics NAV as its system of choice. Dynamics NAV automates and streamlines financial, customer relationship, and supply chain processes. ProStrategy was the preferred supplier for the project, and Holmes recalls the first meeting where ProStrategy emphasised the importance of working together to install the new ERP system and ensure a successful outcome. “They flew to Cork every two weeks to attend meetings at 8am so that showed us the level of commitment that was needed,” he says. A subsequent two-week session involving staff from ProStrategy and Casey’s resulted in an Enterprise Design Document (EDD) which outlined all the major processes within the business. “This exercise helped identify how the software should be configured. This proved to be invaluable and we got the system exactly as designed. We still refer back to this EDD six years on when we have a process we need to review,” adds Holmes, who pays tribute to ProStrategy’s ability to understand the business as a key part of the project’s successful outcome.

ProStrategy provided full implementation and customisation for the new system, in addition to migrating data from the legacy application. “From an implementation point of view, the biggest challenge was moving from a multitude of systems to a single system without any phasing. I suppose this was a high-risk strategy for the business but with careful testing and re-testing we felt it was a risk worth taking,” says Holmes. The window of opportunity for the move was also very tight. “The way this worked – and this was one of the fantastic things about ProStrategy – was that we agreed we would do a ‘big bang’: we turned off the old system on Friday at 4pm and turned on Dynamics NAV on Monday at 9am.”

ProStrategy also provided training services to ensure staff would quickly understand how the new system worked. Currently, 30 Casey’s employees use Dynamics NAV on a daily basis for financials, inventory, sales order and quotation management and purchase management. The



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company opted for a 'train the trainer' approach that would see a member of Casey's staff from each of the key areas including warehousing, financing and sales being trained by ProStrategy and then these members of staff in turn training their colleagues.

The Project Benefits:

Better margin control

Casey's Furniture now has the ability to review cost and sales pricing for current and future sales, which was manual and time consuming before. It also has improved control of its margins at all levels, from sales quotes and sales orders, to purchase orders and purchase invoice payments. Thanks to Dynamics NAV, the business can quickly identify and fix any pricing issues – which is then reflected in the products on display in its stores. Dynamics NAV provides previously unavailable levels of visibility, says Holmes. "You can't just change your prices every day, so you need your system to provide accurate and up to date information quickly to the key decision makers in the company."

Improved customer service

With the new system in place, Casey's staff can respond to customer needs more proactively, and can better track activities relating to customers such as help desk and delivery scheduling. "It is very important that we communicate regularly with our customers and keep them informed of the status of their order and their expected delivery date" says Holmes. "The system is correct, and the information is in there." The next step for the company is to integrate a business intelligence tool into Dynamics NAV to further improve the visibility of information within the system.

Stable, user friendly software

Dynamics NAV has the advantage of working like familiar Microsoft software such as the Office productivity tools, so that it's easy to learn and use, even for staff members with minimal experience of computers. Moreover, the product's heritage guarantees stability – which marks an improvement on the previous system that Casey's had been using. "When you click 'post' an invoice or update a sales order, you know it's done. You don't have to worry about it not getting processed correctly. That's great for staff," says Holmes. It's also easy to manage user access as new members of staff join the company, he adds.

Greater visibility of the business

"We took a simplistic approach at the start that we were going to do everything through Microsoft Dynamics NAV. Except for our payroll system, we have no other software in the business. We do everything within NAV and we built three simple worksheets to give us visibility of every line in every sales order, every purchase order and every item of stock, so there really isn't anything that we can't find," says Holmes. Microsoft Dynamics NAV integrates well with Excel for further reporting and analysis, and it stores the data in a way that makes it easy to layer more sophisticated business intelligence tools on top.

Summary:

Casey's Furniture has been able to make "significant savings" in headcount due to increased operational efficiencies, and the company has also improved customer service levels in line with its original aim, Holmes confirms. The features of Microsoft Dynamics NAV and the flexibility it offers have given Casey's management fresh visibility into how the business is performing, in near real-time. What's more, Dynamics NAV is designed to have further business intelligence layers built on top, allowing Casey's to analyse its business in even finer detail going forward.

In order to make Dynamics NAV deliver on its promise, it needed an integration partner, and Holmes praises ProStrategy's role in ensuring the successful outcome. "One of the best attributes ProStrategy brought to the table was to first learn about how our business processes worked. That enabled them to help us build the right system. Microsoft Dynamics NAV has made a huge difference to us. The beauty about NAV is it just works."